

Thomas Mahoney, CFA, CAIA Named December Volunteer of the Month



CFA Society Los Angeles (CFALA) places a heavy emphasis on financial education, which is exemplified through its many continuing education presentations, educational courses, and relationship with the nonprofit California Council on Economic Education (CCEE). Thomas Mahoney, CFA, CAIA, our December Volunteer of the Month, believes in the mission of educational empowerment and strives to provide high-quality educational opportunities for financial professionals.

“I’m a very big believer in idea-sharing. I believe that in our industry, if you can form a network of top thinkers, that it is going to help everybody,” Mahoney said. “By reaching out to colleagues and peers to get involved, I feel that I’m offering my strengths to the organization while at the same time helping my colleagues and myself.”

Mahoney was an integral component of putting together the 2015 Alternative Investments Conference Los Angeles (ALTSLA), which involved many great speakers and sold-out well in advance of the conference. While it did not initially intend to become an annual event, its success has spurred the 2nd Annual ALTSLA on March 10th, 2016.

“My role [with ALTSLA] was really to persuade the various members and factions that it could be economically viable but it also met an unfilled need,” he explained. “I felt that the alternative investment landscape is so complex that there is a real need for education there.”

As a CFA Charterholder and member of CFALA since 2000, Mahoney has believed that volunteering in educational efforts would be the most effective way to provide benefits to the financial community. At CFALA, he has been a Co-Chair of the Alternative Investments Group and currently serves as the Co-Chair of the Private Wealth Management Group.

“I think that CFALA is the organization that is best positioned to promote financial education in the city,” Mahoney said. “It has the most authority. It is, in my view, the leader not just in Los Angeles, but in Southern California. I think it is important to volunteer to help move forward the goal of creating a top idea-sharing network and creating great professional education events.”

Prior to his current role as a Private Wealth Advisor for UBS Private Wealth Management, Mahoney has served as Vice President at Donaldson, Lufkin &

Jenrette, an Investment Advisor at Kidder Peabody, and an Investment Advisor at E.F. Hutton & Co. He received his Bachelor of Business Administration (BBA) in Finance at the University of Wisconsin-Madison in 1981 and his Master of Business Administration (M.B.A.) at Pepperdine University, The George L. Graziadio School of Business and Management in 1987.